Reading Lists Online User Guide

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Introduction

This Staff User Guide has been designed to provide members of the library staff with information on the use of the administrator section of the Reading Lists Online system.

Accessing the administrator home page

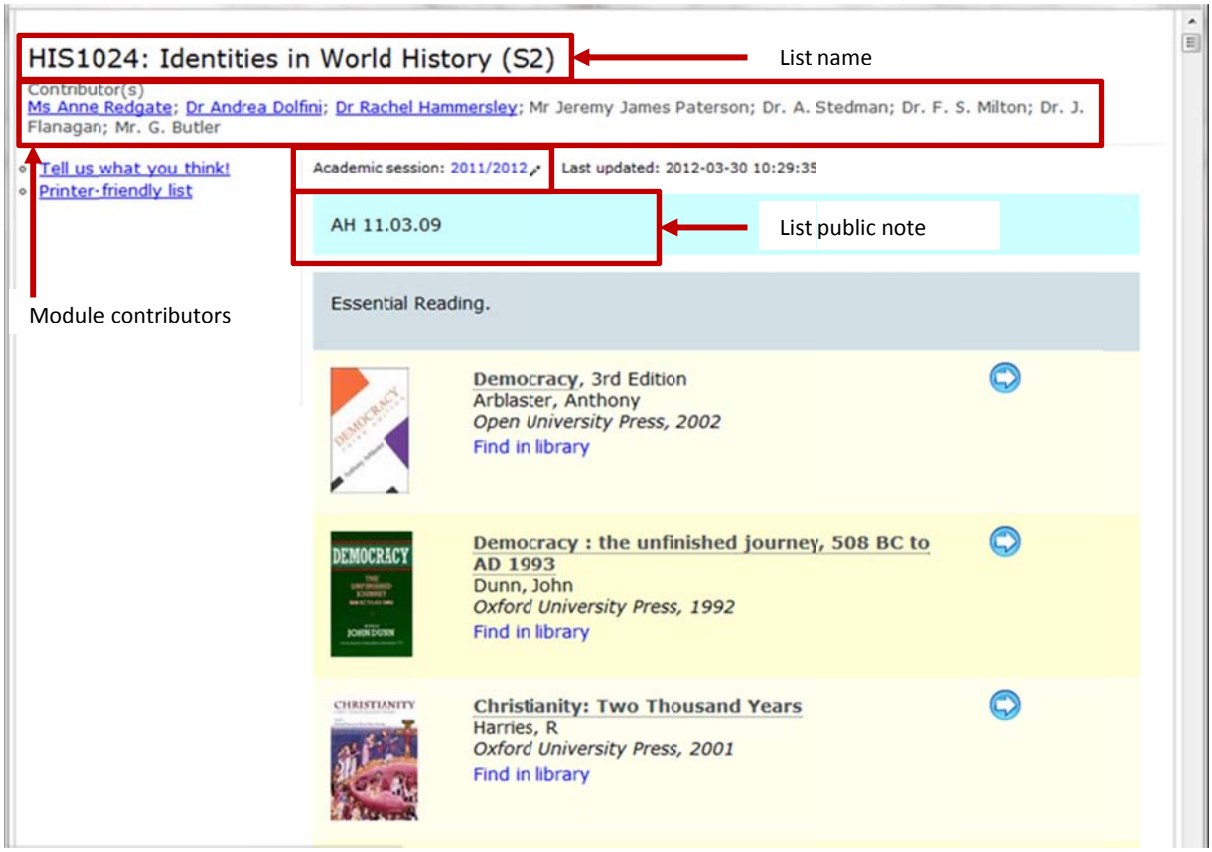
1. Go to the web address https://rlo.ncl.ac.uk/ .
2. Click the Admin link on the RLO main menu.
3. If you are not logged in, click on the Login link.
4. Enter your campus n-id and password.
5. If your details are correct then you will be taken to the administrator home page for RLO. If you're still unable to access the administrator home page and you believe you should then please contact the Web team.

Working with a reading list

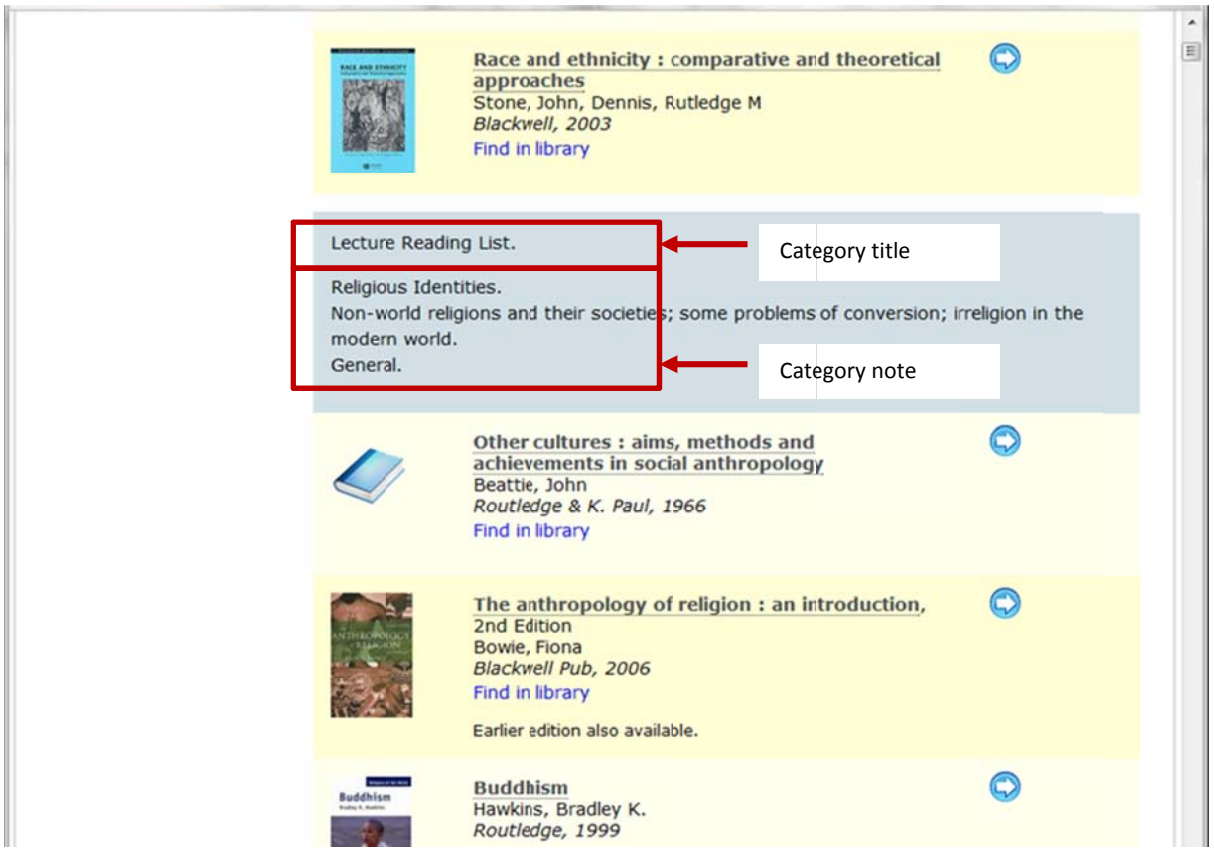
The following section will show you how to manage reading lists. It assumes you have been given administrator privileges to RLO.

Structure of a reading list

The two following diagrams provide an overview of RLO's reading list structure.


HIS1024: Identities in World History (S2)
List name
Contributor(s)
Ms Anne Redgate; Dr Andrea Dolfini; Dr Rachel Hammersley; Mr Jeremy James Paterson; Dr. A. Stedman; Dr. F. S. Milton; Dr. J. Flanagan; Mr. G. Butler
Tell us what you think!
Printer-friendly list
Academic session: 2011/2012
Last updated: 2012-03-30 10:29:35
AH 11.03.09
List public note
Module contributors
Essential Reading.
Democracy, 3rd Edition
Arblaster, Anthony
Open University Press, 2002
Find in library
Democracy : the unfinished journey, 508 BC to AD 1993
Dunn, John
Oxford University Press, 1992
Find in library
Christianity: Two Thousand Years
Harries, R
Oxford University Press, 2001
Find in library

Structure of a reading list (1)

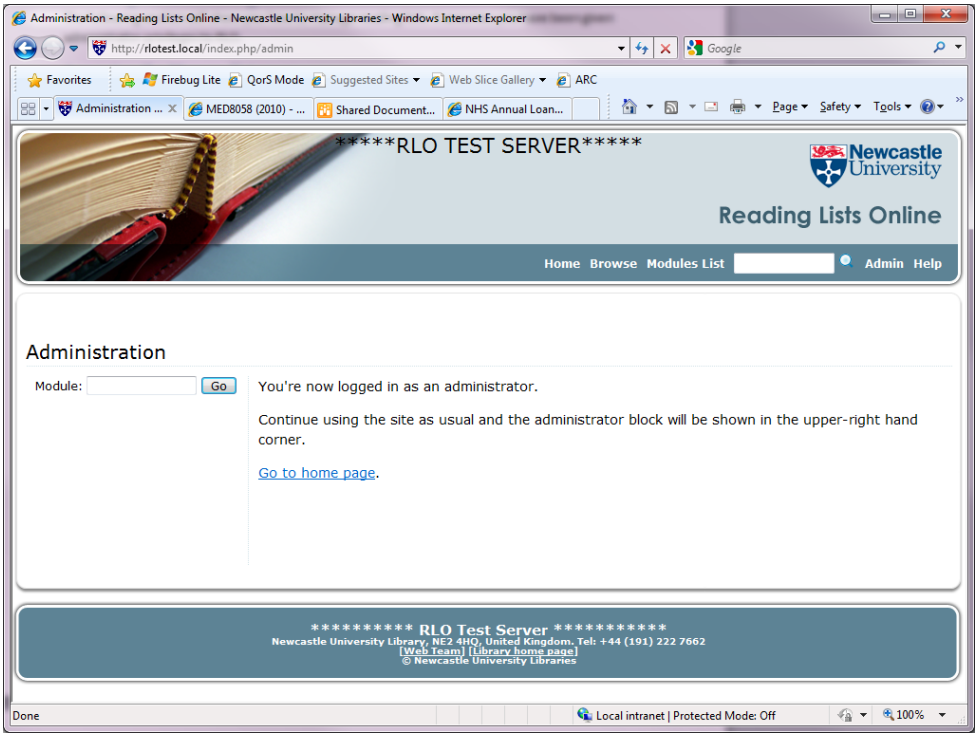


Structure of a reading list (2)

Accessing the Manage list page

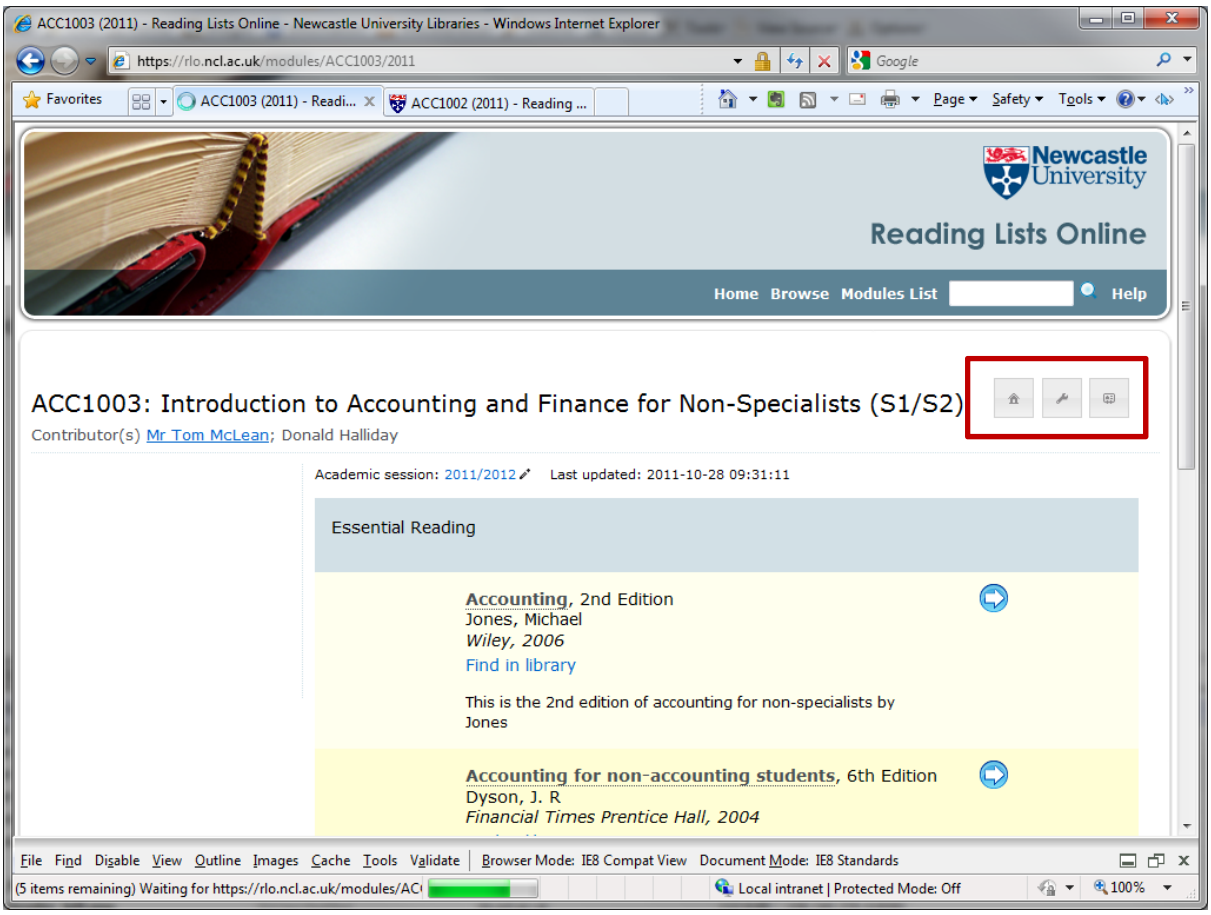
The Manage list page is the main page which manages the administration of reading lists for a module. So as to access this page you will need to have been provided with administration privileges.

1. Log into the administrator home page of RLO.
2. On the administrator home page, type in the module code then press the ENTER key or click the Go button.


Administration - Reading Lists Online - Newcastle University Libraries - Windows Internet Explorer
*****RLO TEST SERVER*****
Newcastle University
Reading Lists Online
Home Browse Modules List Admin Help
Administration
Module: Go
You're now logged in as an administrator.
Continue using the site as usual and the administrator block will be shown in the upper-right hand corner.
Go to home page.
********** RLO Test Server **********
Newcastle University Library, NE2 4HQ, United Kingdom. Tel: +44 (191) 222 7662
[Web Team] [Library home page]
© Newcastle University Libraries
Done
Local intranet | Protected Mode: Off
100%

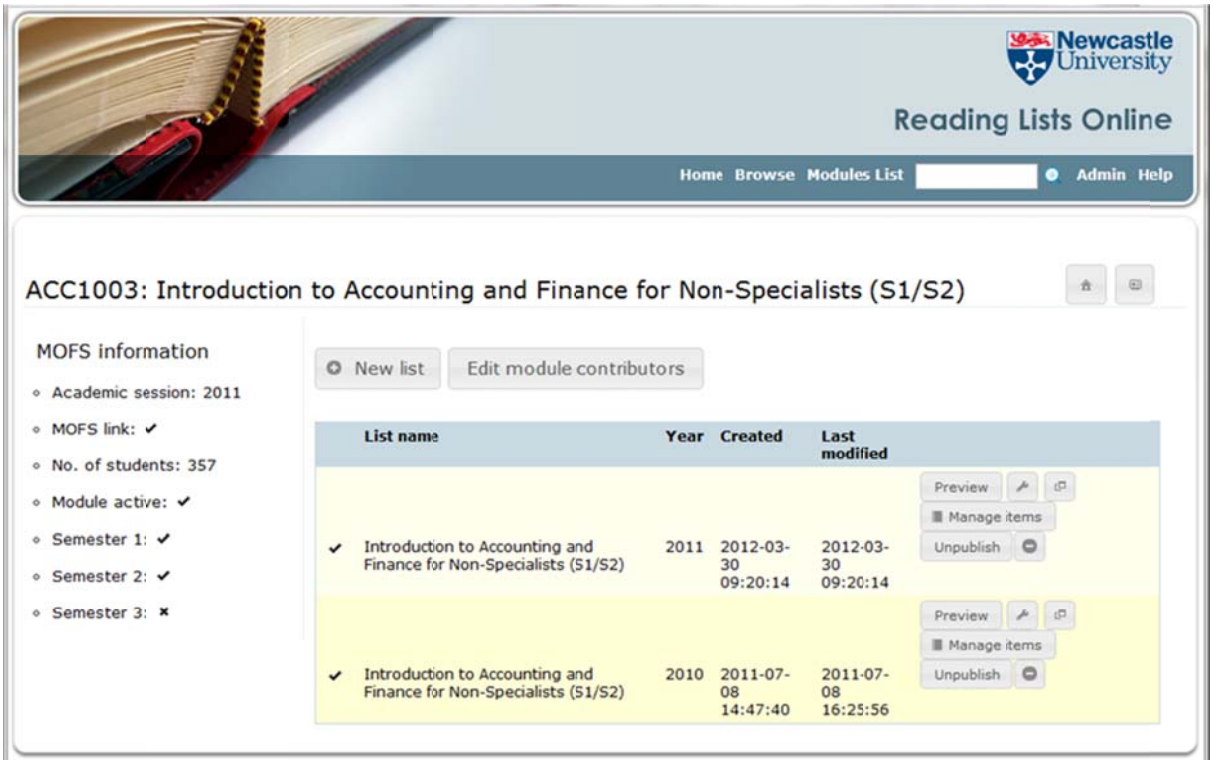
The administrator home page

3. Another option is to navigate to the module using the browse or search functions of RLO. When the reading list is shown, click on the *Manage lists* icon on the administrator block.


ACC1003 (2011) - Reading Lists Online - Newcastle University Libraries - Windows Internet Explorer
https://rlo.ncl.ac.uk/modules/ACC1003/2011
Newcastle University
Reading Lists Online
Home Browse Modules List Help
ACC1003: Introduction to Accounting and Finance for Non-Specialists (S1/S2)
Contributor(s) Mr Tom McLean; Donald Halliday
Academic session: 2011/2012 Last updated: 2011-10-28 09:31:11
Essential Reading
Accounting, 2nd Edition
Jones, Michael
Wiley, 2006
Find in library
This is the 2nd edition of accounting for non-specialists by Jones
Accounting for non-accounting students, 6th Edition
Dyson, J. R
Financial Times Prentice Hall, 2004
Local intranet | Protected Mode: Off
100%

The administrator block on reading lists

4. The manage list page allows the following to be done:
    a. Create lists.
    b. Manage contributors to lists.
    c. Preview published/unpublished lists. Note that only administrators can preview unpublished lists.
    d. Change list parameters such as its year or notes associated with it.
    e. Manage the items on the list.
    f. Publish/unpublish the list.
    g. Duplicate a reading list
    h. View (and/or edit) private notes associated with a list. These notes are displayed below the list name.



Manage list page

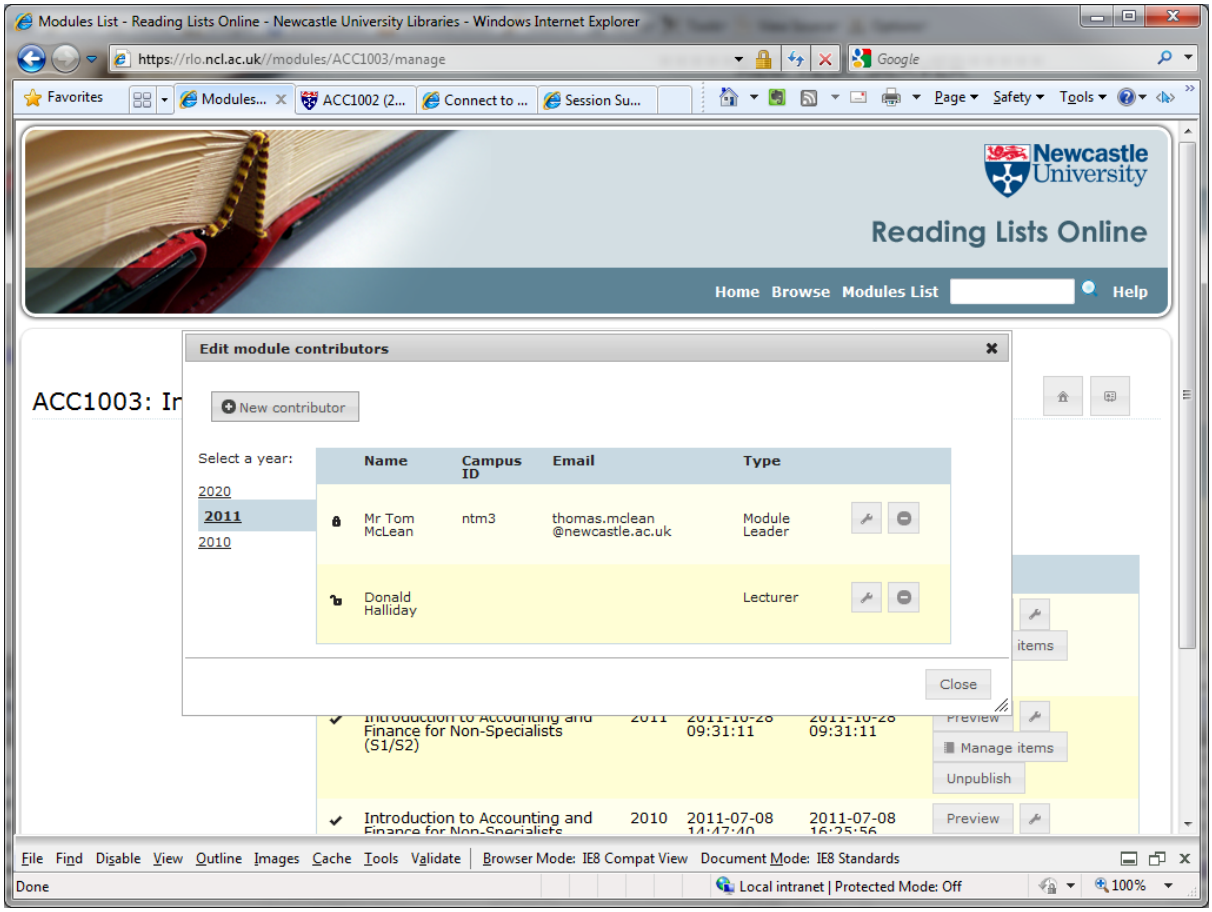
Creating a new list for a module

1. Select the module by searching or navigating to it.
2. Go to the Manage list page.
3. Click on the New list button. A dialog box will appear with fields to be filled.
    a. *List name:* name of list to be shown on the reading list. Unless you are testing, it should be the name of the module.
    b. *Year:* the year should correspond with the module year. Otherwise, a fictitious one (e.g., 2020) may be used for testing.
    c. *Stage:* the stage for the reading list.
    d. *Public note:* is displayed as the header for the reading list.
    e. *Library note:* a private note for the librarians.
4. Click on the Add button when done.

5. A new unpublished list is created.

Editing module contributors

1. Select the module by searching or navigating to it.
2. Go to the Manage list page.
3. Click the Edit Module Contributors button. A dialog box appears showing the reading lists and the contributors defined for them



Module contributors dialog box

4. Before proceeding, ensure that the correct year is selected. By default, the current academic year is selected.

Adding a module contributor

1. Ensure that the Edit module contributor dialog box is displayed and that the appropriate year has been selected.

a. If you get the following error message:

it simply means that RLO could not find any information for the current academic session - in this case there is no list for 2011/12.

b. Ignore the message and click the year whose contributor records are to be modified.

2. Add a new contributor by clicking on the New contributor button. The Add contributor dialog box appears. The following fields are available:
   a. *Campus ID (optional):* If the contributor is a Newcastle University member of staff and it is required that RLO maintain the contributor details then use their campus n-id. RLO will automatically populate the contributor's name and e-mail address.
   b. *Contributor name:* In order to maintain the contributor's details manually then leave the campus ID field blank and type in the contributor's name.
   c. *Contributor e-mail address:* In order to maintain the contributor's details manually then leave the campus ID field blank and type in the contributor's email address.
   d. *Contributor type:* Select the contributor's role in relation to the module. This would also affect the order in which the contributor names are displayed on the reading list.
3. Click the Add contributor button.

Editing module contributor details

1. Ensure that the Edit module contributor dialog box is displayed and that the appropriate year has been selected.
   a. If you get the following error message:

it simply means that RLO could not find any information for the current academic session - in this case there is no list for 2011/12.

   b. Ignore the message and click the year whose contributor records are to be modified.
2. Click the Edit button on the line corresponding with the contributor to be modified.
3. The Edit contributor dialog box appears.

4. Update the contributor details as required.
5. Click the Update contributor button.

Deleting a module contributor

1. Ensure that the Edit module contributor dialog box is displayed and that the appropriate year has been selected.
    a. If you get the following error message:

    it simply means that RLO could not find any information for the current academic session - in this case there is no list for 2011/12.
    b. Ignore the message and click the year whose contributor records are to be modified.
2. Click the Delete button on the line corresponding with the contributor to be removed.
3. A verification dialog box will appear. If you still wish to remove the contributor, click the Yes button.

Publishing lists

When a list is created, it is not available on the public view. In order to access an unpublished list, administrator privileges are required.

1. Go to the Manage list page.
2. A tickmark (✓) will be shown on the left of the list if it has been published. Otherwise, an empty circle (○) is displayed.
3. Click on the Publish button to publish a list. A confirmation will be required then the list will be made available on the public view. In addition, the Publish button will change to Unpublish.
4. To unpublish a list, click the Unpublish button. *NOTE: It could take up to 30 minutes for an unpublished list to become unavailable to the public.*

Previewing a list

An unpublished list will not be displayed on the module lists or the public view of the system. In addition, changes made to a list may take up to 30 minutes before it is seen by the public. Consequently, to view an unpublished list, or to see changes made to a list immediately, you must have administrative privileges. In order for an administrator to preview a list, please follow these steps:

1. Select the module by searching or navigating to it.
2. Go to the Manage list page.
3. Click on the Preview button for the list to be viewed.

Duplicating a list

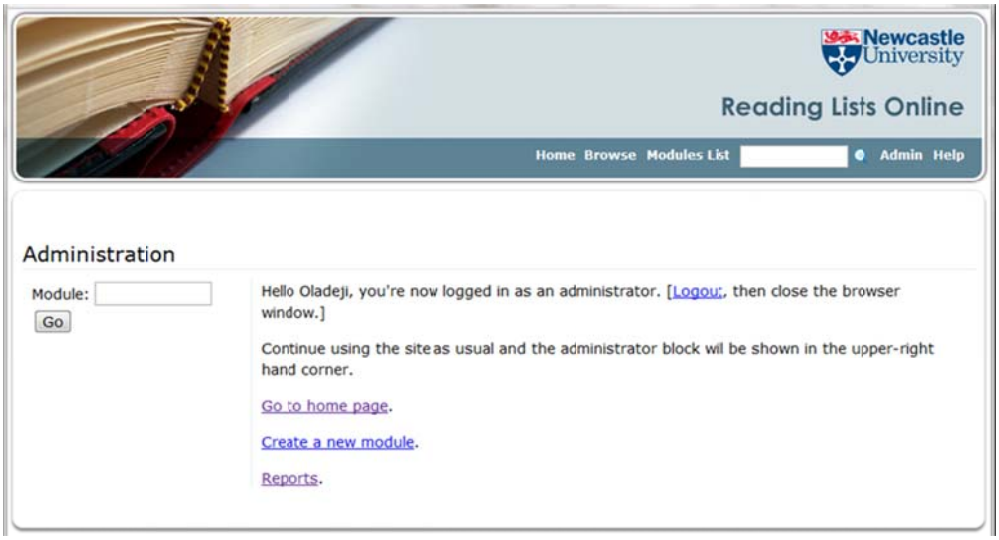
A pre-existing reading list can be duplicated and made available for another academic session or even a new module. The destination module code and academic session must not already exist otherwise an error message will be displayed.

1. Go to the Manage list page.
2. Click the Copy button for the reading list to be duplicated.
3. A dialog box will appear with the option to specify the destination or target module code and the year for the new reading list.
4. Click the Copy button.
5. The details and items of the source reading list will be copied to the new reading list.

Creating a list for a new module

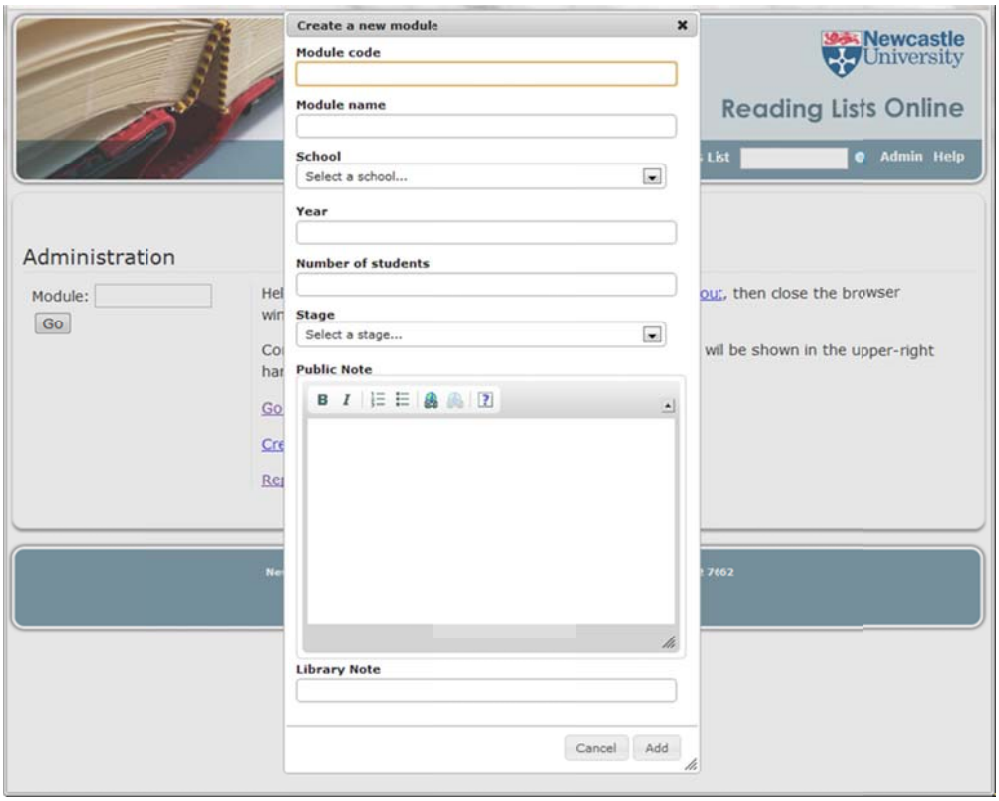
For the most part creating lists for a new module will be done automatically. Nevertheless, in the event a reading list is required for a non-existent module please follow these instructions:

1. Go to the RLO administrator home page


Newcastle University
Reading Lists Online
Home Browse Modules List Admin Help
Administration
Module:
Go
Hello Oladeji, you're now logged in as an administrator. [Logout, then close the browser window.]
Continue using the site as usual and the administrator block will be shown in the upper-right hand corner.
Go to home page.
Create a new module.
Reports.

The RLO administrator home page

2. Click the Create a new module link.
3. The Create a new module form will be displayed (shown below).



Create a new module form

4. The following data is required in order to create a new module on RLO:
   Module code: for the module. The current format for module codes comprises three letters followed by four digits, e.g., HIS1024.
   Module name: name of list to be shown on the reading list. Unless you are testing, it should be the name of the module.
   School:
   Module year: the year should correspond with the module year. Otherwise, a fictitious one (e.g., 2020) may be used for testing.
   Stage: the stage for the reading list.

5. Other data that may be entered include:
   Number of students: the number of registered students for the module for the academic year.
   Public note: is displayed as the header for the reading list.
   Library note: a private note for the librarians.

6. Once finished click on the Add button and the new module with its associated reading lists will be created.

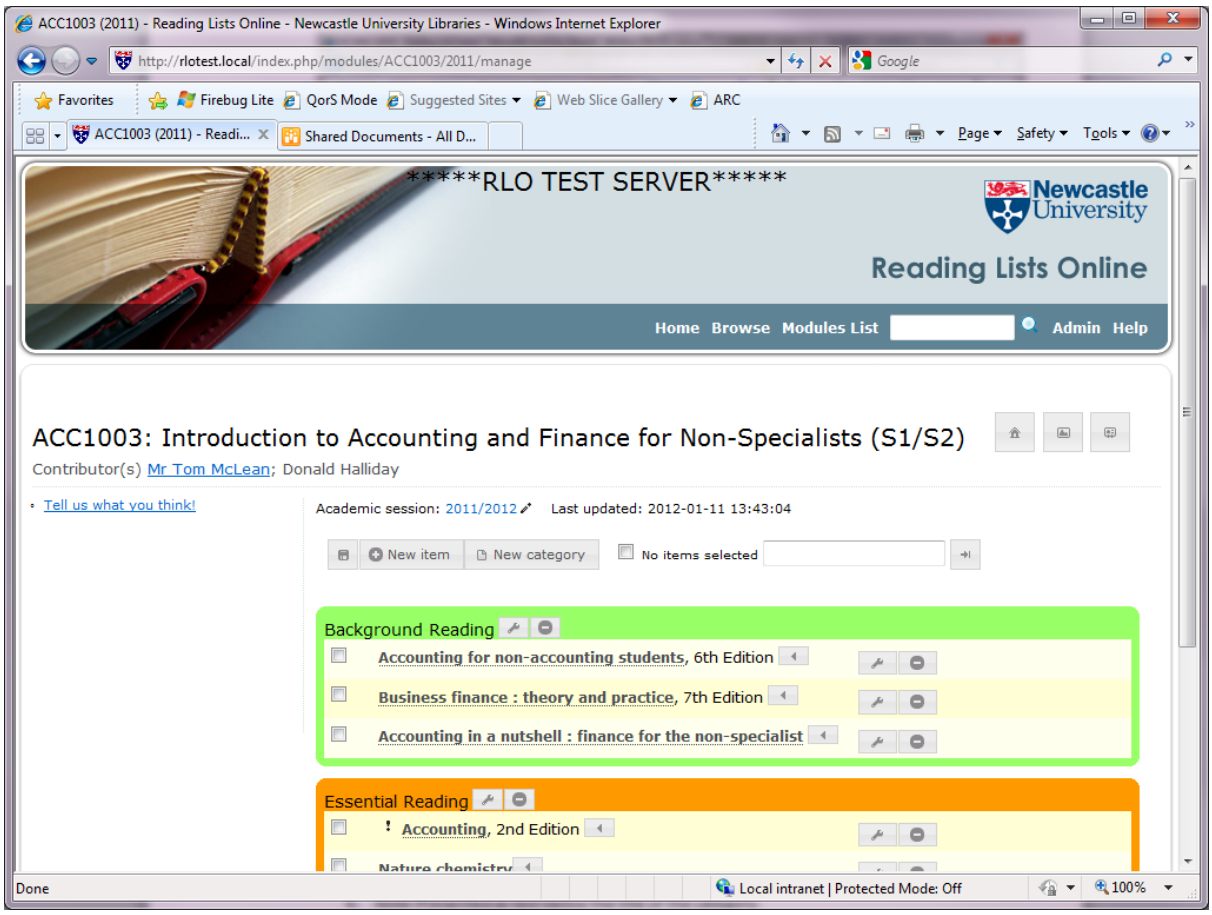
Managing items on reading lists

The following section will show you how to manage the items on reading lists. It assumes you have been given administrator privileges to RLO.

Accessing the Manage items page

The Manage items page is the main page through which the items on reading lists are managed. In order to access this page you will need to have been provided with administration privileges.

1. Select the module by searching or navigating to it.
2. Go to the Manage list page.
3. Click the Manage items button for the list to be modified. The Manage items page will be displayed.


ACC1003 (2011) - Reading Lists Online - Newcastle University Libraries - Windows Internet Explorer
http://rlotest.local/index.php/modules/ACC1003/2011/manage
*****RLO TEST SERVER*****
Newcastle University
Reading Lists Online
Home Browse Modules List Admin Help
ACC1003: Introduction to Accounting and Finance for Non-Specialists (S1/S2)
Contributor(s) Mr Tom McLean; Donald Halliday
Tell us what you think!
Academic session: 2011/2012
Last updated: 2012-01-11 13:43:04
New item
New category
No items selected
Background Reading
Accounting for non-accounting students, 6th Edition
Business finance : theory and practice, 7th Edition
Accounting in a nutshell : finance for the non-specialist
Essential Reading
Accounting, 2nd Edition
Done
Local intranet | Protected Mode: Off
100%

The Manage items page

Adding a new category

When a new list is created, there are no categories assigned to it. A category must be created before items can be added to it. Categories are logical groupings of items and *they also define when items are essential, recommended or background reading.* The categories are colour-coded in order to make easy to identify them: essential – orange, recommended – light blue and background – light green.

1. Ensure the Manage items page is displayed.
2. Click the New category button. The New category dialog box is shown.
3. The following fields are available:

a. *Title:* The title of the category.
b. *Note:* Presented as text below the title of the category.
c. *Type:* One option of essential, recommended or background must be selected.
d. *Student to purchase?:* A flag to specify students are informed that they need to acquire their own copy of the item.

4. Click on the Add button to create the category.
5. Wait for the page to be updated.

Editing a category

1. Beside the category title is the Edit button ( ) which will allow the category to be modified. Click the Edit button and the Edit category dialog box will appear.
2. Update the category details and click the Update button.
3. The category details will be updated and the Manage item page will be shown.

Deleting a category

1. Go to the Manage items page.
2. In order to delete a category, it must be empty.
3. Click the Delete button ( ) beside the category's title.
4. A confirmation will be required. Click the Yes button to proceed with removing the category.

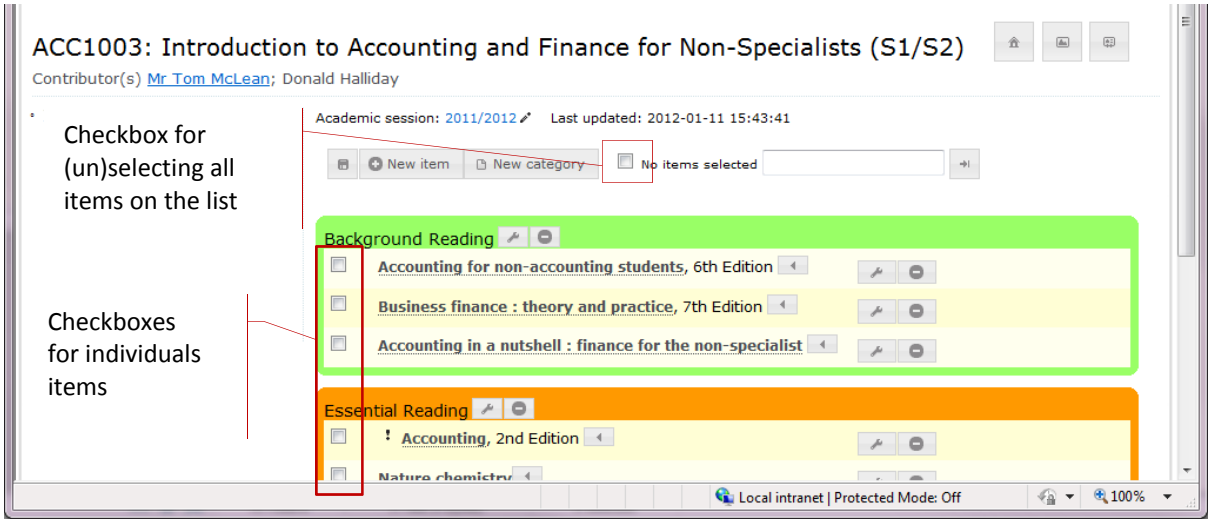
Changing item order

1. Go to the Manage items page.
2. Change the order of items/categories by dragging and dropping them into their appropriate positions. Items can also be moved into different categories in this manner.
3. Click on the Save list order button ( ) to save the current order of the list. *NOTE: If you attempt to leave the Manage items page without saving the current list order, then a prompt will be displayed warning you.*

Appending items to a list

Items on a list can be copied onto another pre-existing list. All appended items will be placed in a category.

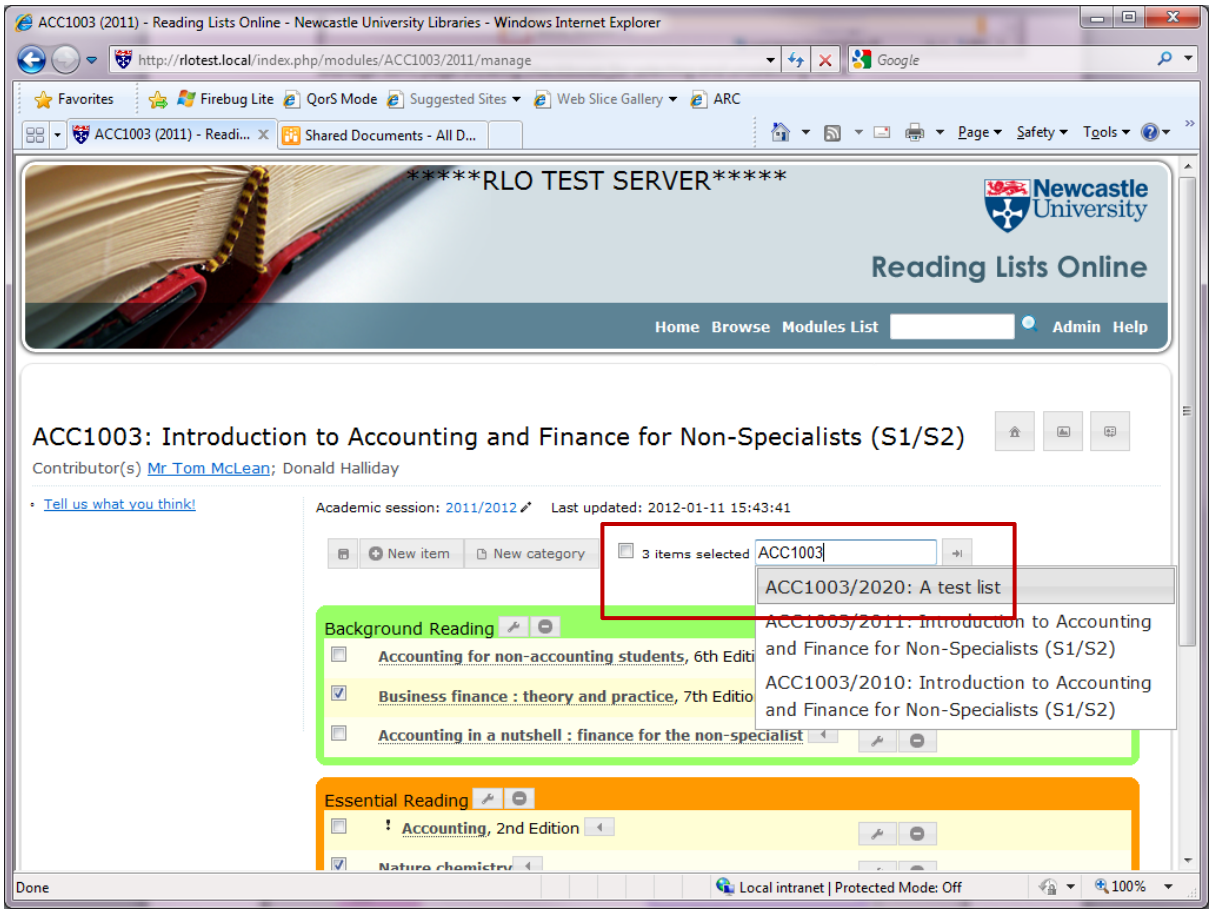
1. Go to the Manage items page.
   Select the items to be appended. The figure below (*Manage items page showing checkboxes for selecting and unselecting items*
2.) shows how to select items.


ACC1003: Introduction to Accounting and Finance for Non-Specialists (S1/S2)
Contributor(s) Mr Tom McLean; Donald Halliday
Checkbox for (un)selecting all items on the list
Checkboxes for individuals items
Academic session: 2011/2012
Last updated: 2012-01-11 15:43:41
New item
New category
No items selected
Background Reading
Accounting for non-accounting students, 6th Edition
Business finance : theory and practice, 7th Edition
Accounting in a nutshell : finance for the non-specialist
Essential Reading
Accounting, 2nd Edition
Local intranet | Protected Mode: Off
100%

Manage items page showing checkboxes for selecting and unselecting items

3. Type in the module name and year separated with a forward slash (**/**).

4. Click on the Append to list button ( ). The figure below (*Appending items to a pre-existing list*) demonstrates this feature.


ACC1003 (2011) - Reading Lists Online - Newcastle University Libraries - Windows Internet Explorer
http://rlotest.local/index.php/modules/ACC1003/2011/manage
*****RLO TEST SERVER*****
Newcastle University
Reading Lists Online
Home Browse Modules List Admin Help
ACC1003: Introduction to Accounting and Finance for Non-Specialists (S1/S2)
Contributor(s) Mr Tom McLean; Donald Halliday
Tell us what you think!
Academic session: 2011/2012
Last updated: 2012-01-11 15:43:41
New item
New category
3 items selected
ACC1003
ACC1003/2020: A test list
ACC1003/2011: Introduction to Accounting and Finance for Non-Specialists (S1/S2)
ACC1003/2010: Introduction to Accounting and Finance for Non-Specialists (S1/S2)
Background Reading
Accounting for non-accounting students, 6th Editi
Business finance : theory and practice, 7th Editio
Accounting in a nutshell : finance for the non-specialist
Essential Reading
Accounting, 2nd Edition
Done
Local intranet | Protected Mode: Off
100%

Appending items to a pre-existing list

5. The selected items will be appended to the list.

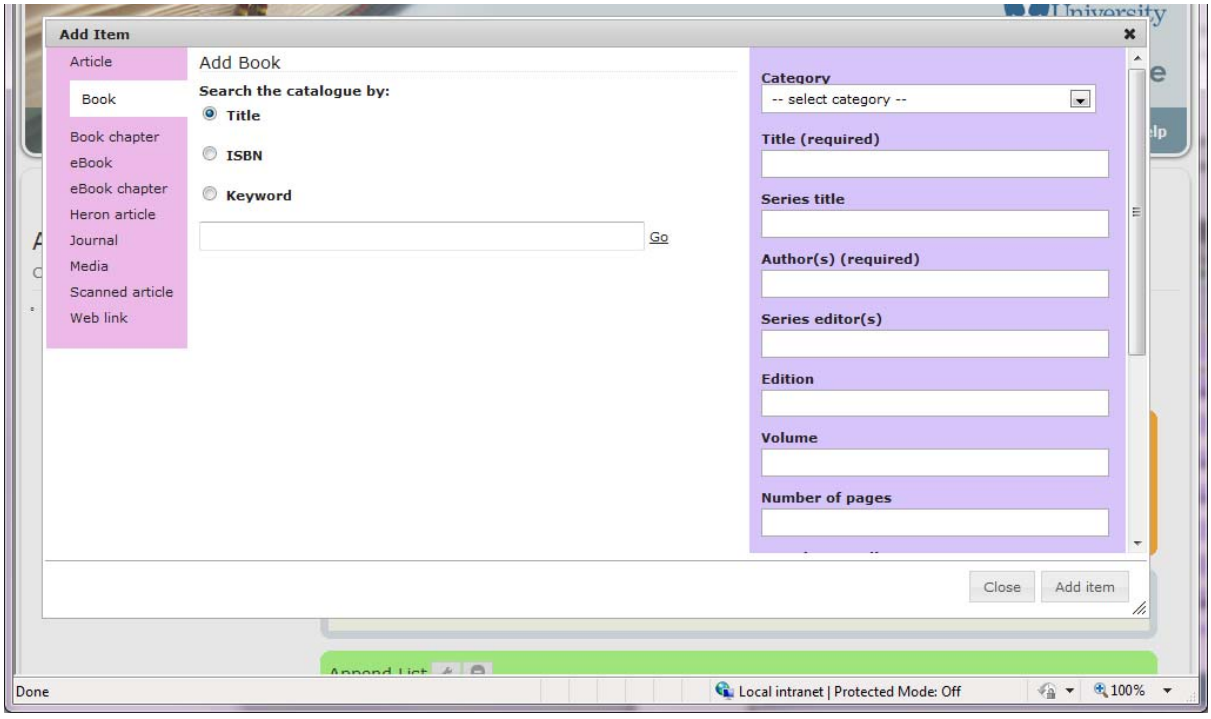
Items appended to a list

Adding materials

1. Go to the Manage items page.
2. For a new list, ensure that at least a category has been created.
3. Click the New item button. The Add item dialog box will appear.
4. Select the type of item to add.

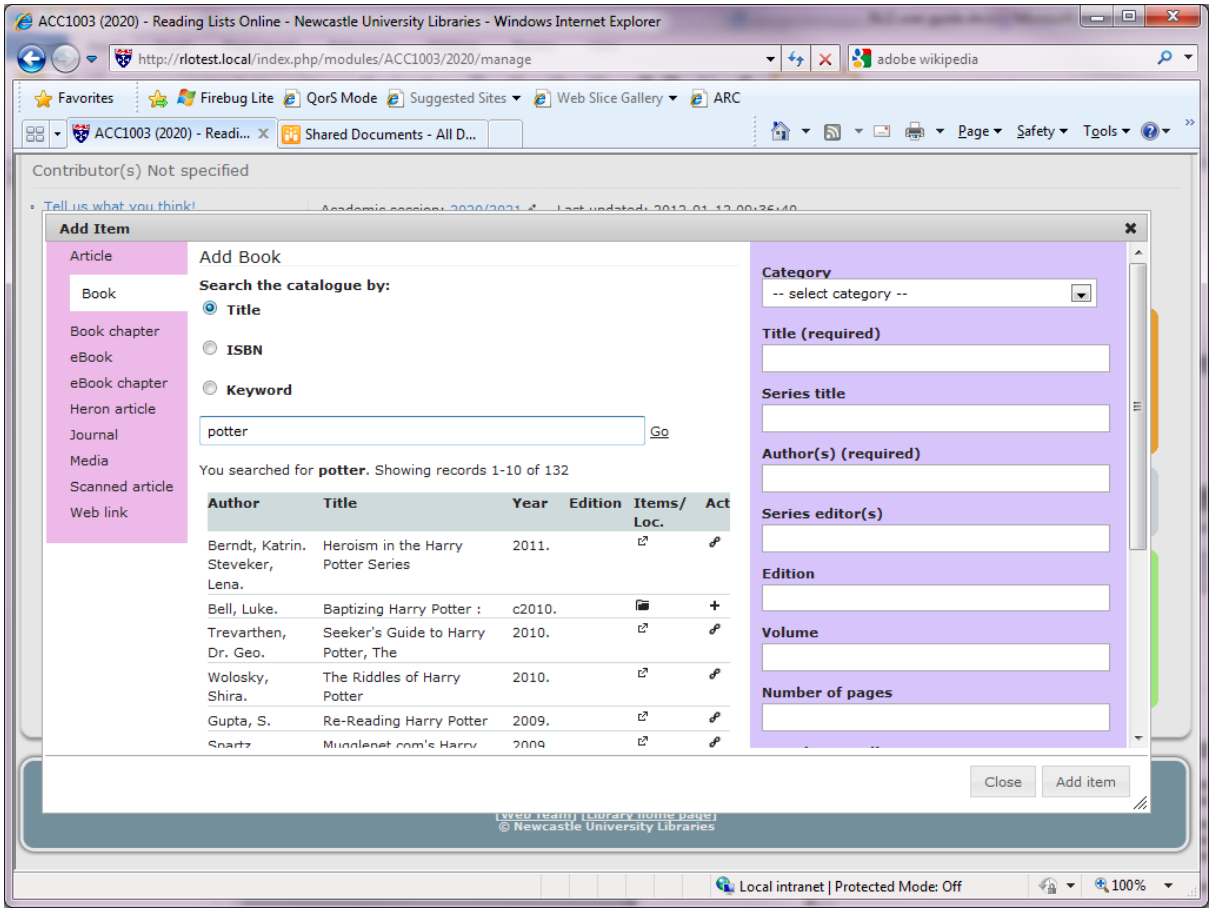
Adding a book, book chapter, eBook or eBook chapter

The decision to create a reference to a book or an eBook is dependent on the resource type that should be mainly used. In addition, a link can be created which would point to the other material type.



The Add item dialog box

1. Click either the Book, Book Chapter, eBook or eBook chapter link to create a material.
2. The material details can be entered manually, or metadata from the library's catalogue can be retrieved by a title, ISBN or keyword search.

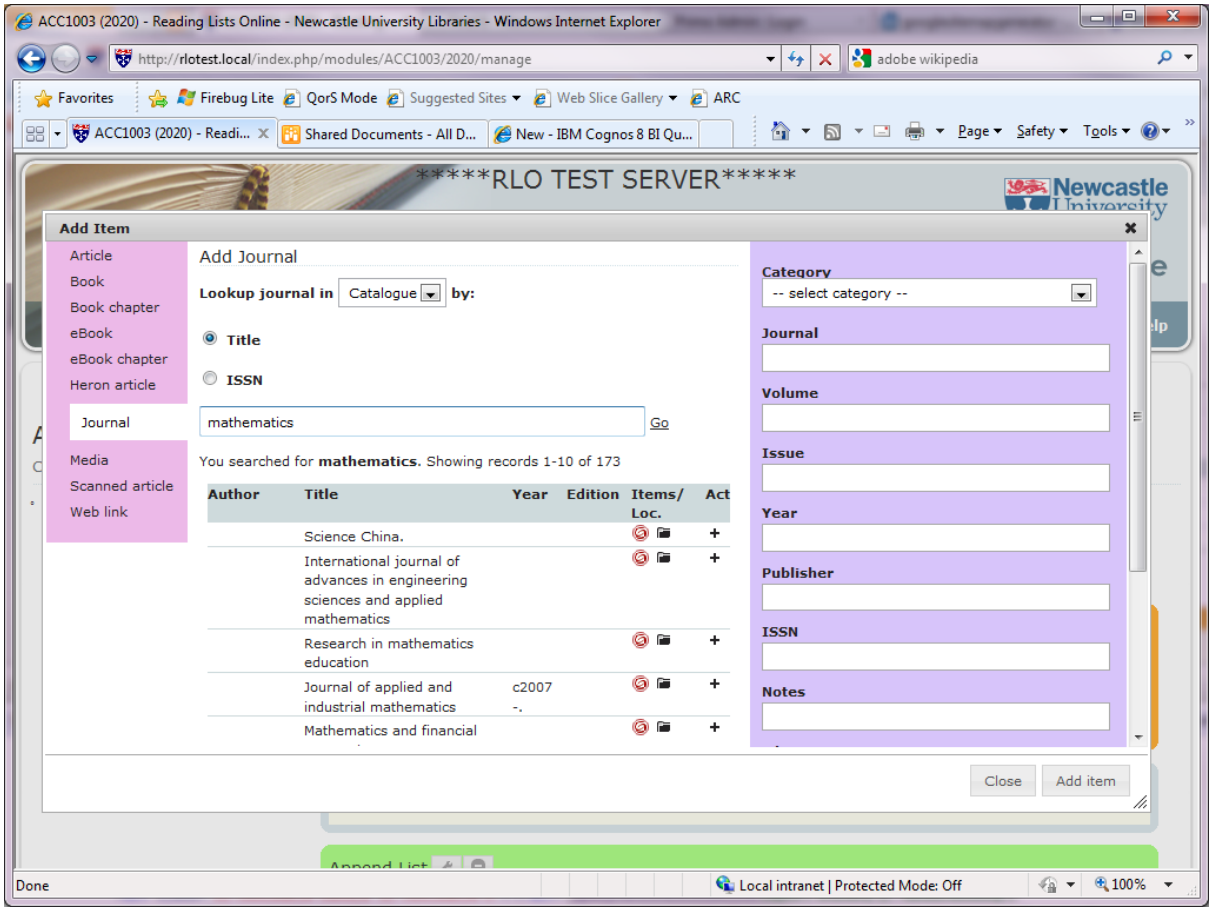


A title search on the library catalogue

3. The results of the search can be transferred to the form by clicking the Add Item hyperlink (+). A link to a subsequent resource can be added by clicking the Add Link hyperlink (🔗). If a book is being added, then eBook resources can be linked to by the book resource. The reverse applies if an eBook is being added.
4. Clean-up the data transferred.
5. Select a category for the new material. The material will be appended to the category.
6. Click the Add item button in the lower-right hand corner of the dialog box.
7. Multiple records can be added and when finished, click the Close button.
8. Wait for the Manage items page to re-load.

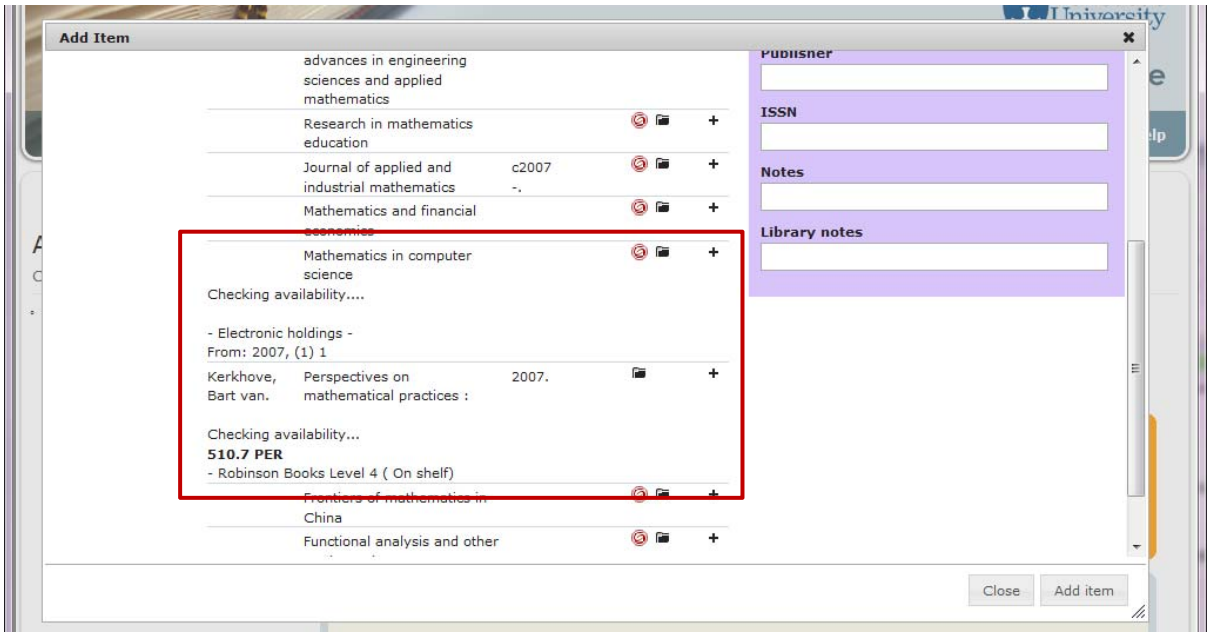
Adding an article or a journal

1. On the Add item dialog box, click the article or journal material type.
2. The material details can be entered manually, or metadata from the library's catalogue can be retrieved by a journal title or ISSN search.



Journal title search

3. Click the SFX button ( ) to bring up the SFX menu.
4. Click the Holdings button ( ) to check the journal's print and electronic availability.



Electronic and print journal holdings information

5. The results of the search can be transferred to the form by clicking the Add Item hyperlink (+).
6. If applicable, click the View resource link ( ) to view the resource. A link to the resource can be added by clicking the Add Link hyperlink ( ).
7. Clean-up the data transferred.
8. Select a category for the new material. The material will be appended to the category.
9. Click the Add item button in the lower-right hand corner of the dialog box.
10. Multiple records can be added and when finished, click the Close button.
11. Wait for the Manage items page to re-load.

Adding a CLA scanned article

1. On the Add item dialog box, click the Scanned article material type.
2. Select the category to place the material.
3. The metadata for the material is typed in manually.
4. Ensure only the Scan ID of the material is typed in the Scanned article ID field. For example, if provided with the URL http://rattler.ncl.ac.uk/scanning/scancheck.asp?ID=**1604**, the scanned article ID is the number 1604.
5. Click the Add item button to save the metadata.
6. When you are finished entering new data, click the Close button.
7. Wait for the Manage items page to re-load.

Adding a Heron article

1. On the Add item dialog box, click the Heron article material type.
2. Select the category to place the material.
3. The metadata for the material is typed in manually.
4. Ensure the complete URL to the article is typed into the Heron article URL text box.
5. Click the Add item button to save the metadata.
6. When you are finished entering new data, click the Close button.
7. Wait for the Manage items page to re-load.

Adding a Web link

1. On the Add item dialog box, click the Web link material type.
2. Select the category to place the material.
3. The metadata for the material is typed in manually.
4. Ensure the complete URL to the web page is typed into the URL text box.
5. Click the Add item button to save the metadata.
6. When you are finished entering new data, click the Close button.
7. Wait for the Manage items page to re-load.

Viewing an unpublished list

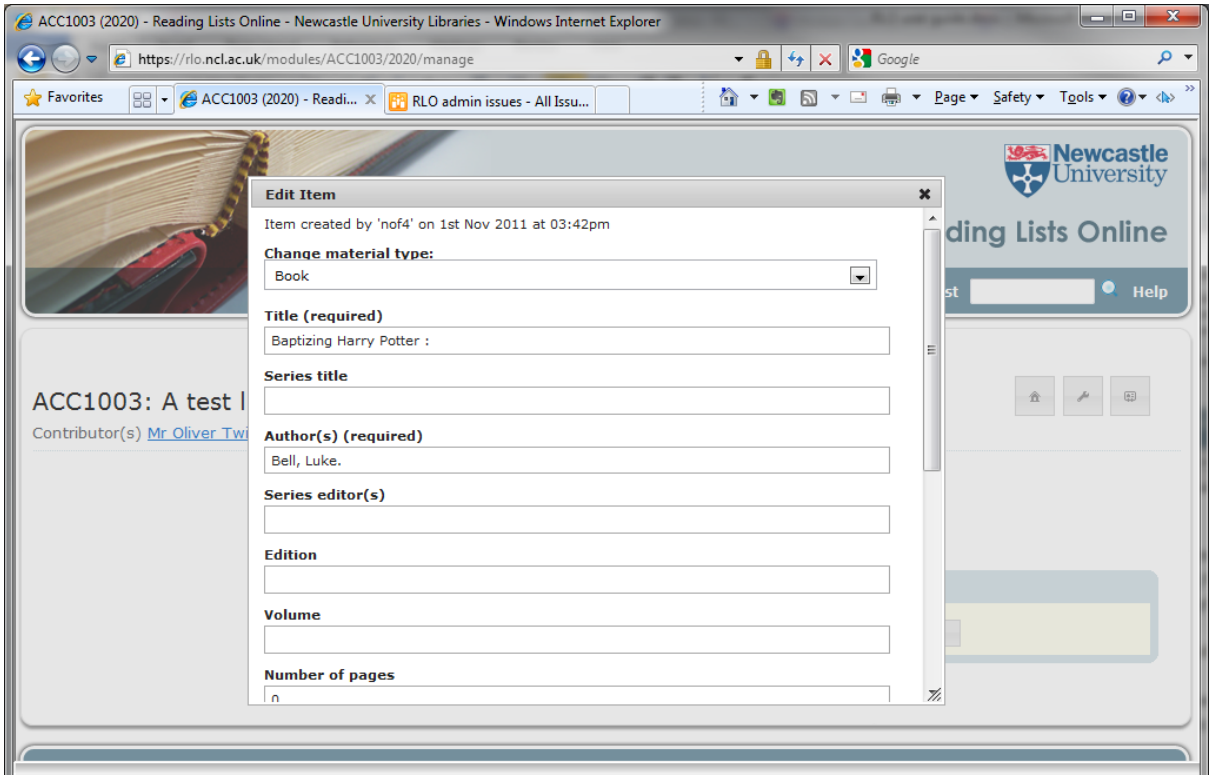
Whilst managing the items, a preview of the list can be performed by clicking the Preview list icon ( ) located on the administrator block.

Editing materials

Besides changing the material's metadata it is also possible to change the material's type, for example, from a book to an eBook. *NOTE: It could take up to 5 minutes before changes to a list are*

made available to the public. However, administrators are able to preview their changes immediately.

1. Go to the Manage items page.
2. Click the Edit button for the material to be changed.



Edit item page

3. Update the material metadata as required.
4. Click the Update items details button to save the changes.
5. *You will need to refresh the screen to display the changes made.* Items that have been changed are marked with a refresh icon ( ). Click on the icon to refresh the page.

Deleting a material

1. Go to the Manage items page.
2. Click the Delete button ( ) beside the item's title.
3. A confirmation will be required. Click the Yes button to proceed with removing the item.

Reports

Different reports can be produced from RLO. The following instructions show how the reports can be accessed.

1. Go to the RLO administrator home page
2. Click the Reports link.

3. Select the appropriate report to run. If necessary, enter the details required for the report to run.

List of reports

As at 21 May 2012, the following reports are available. Please check RLO for the most up-to-date information on the reports that are available.

Report name	Description
Lookup items	Search for items and the reading lists they are present on